

Division of Family ResourcesTraining Team June 2019

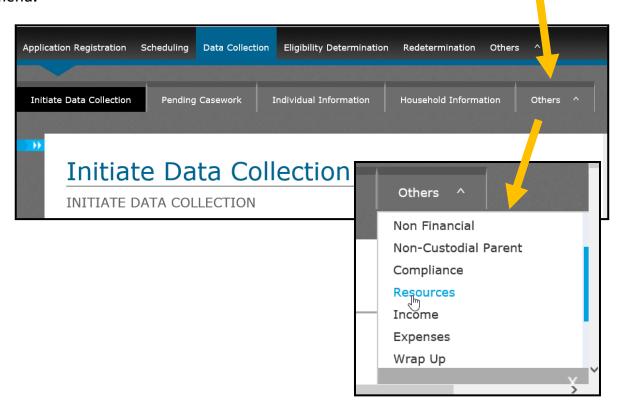


Intuitions: Retro Resources

<u>Step 1</u>: During data collection at application point, the Logical Units of Work will take you the Liquid Assets detail page, where retro resources are entered. However, after data collection is complete, use the "Case Change" Action from the Quick Jump on the home page.



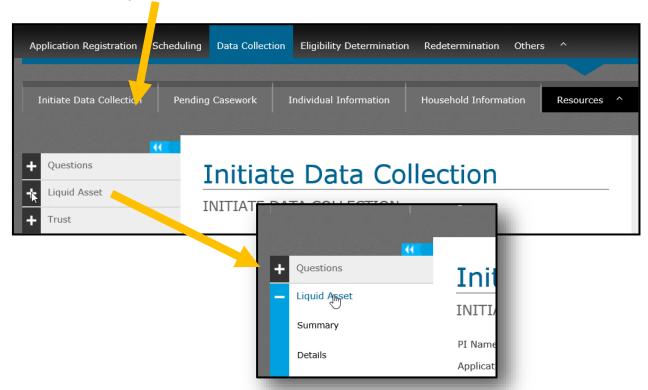
<u>Step 2</u>: This will open the case home page. Ensure that "Data Collection" is selected from the top navigation bar and then click on the "Others" caret from the sub-navigation menu. This will open up a drop down menu. Select "resources" from the drop down menu.



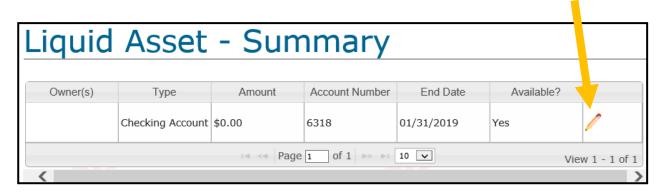


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<u>Step 3:</u> This will bring up the left navigation bar. Click the "+" to open the liquid assets, then click on "Liquid Asset".

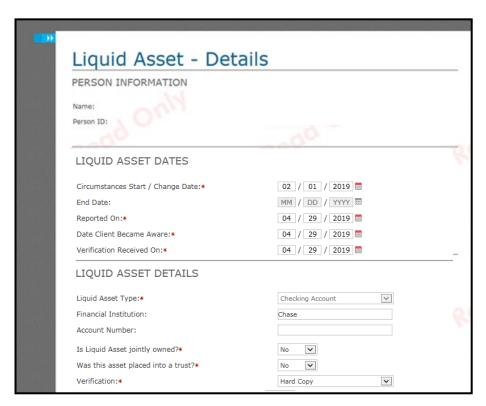


Step 4: This will bring up the "Liquid Asset - Summary". Clock on the pencil icon to edit.



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<u>Step 5:</u> This brings up "Liquid Asset - Details". Enter your CSCD date for the first retro month and enter the bank account information and balance.



<u>Step 5:</u> Click "Continue". Navigate back to the "Liquid Details page and update the CSCD date and the balance to the next retro month (this will cause your previous retro entry to go into history). Click "Continue".

Step 6: Repeat the process as needed until all retro months and the application month balance have been entered. You can navigate through the history by using the up and down arrows on the bottom left.

